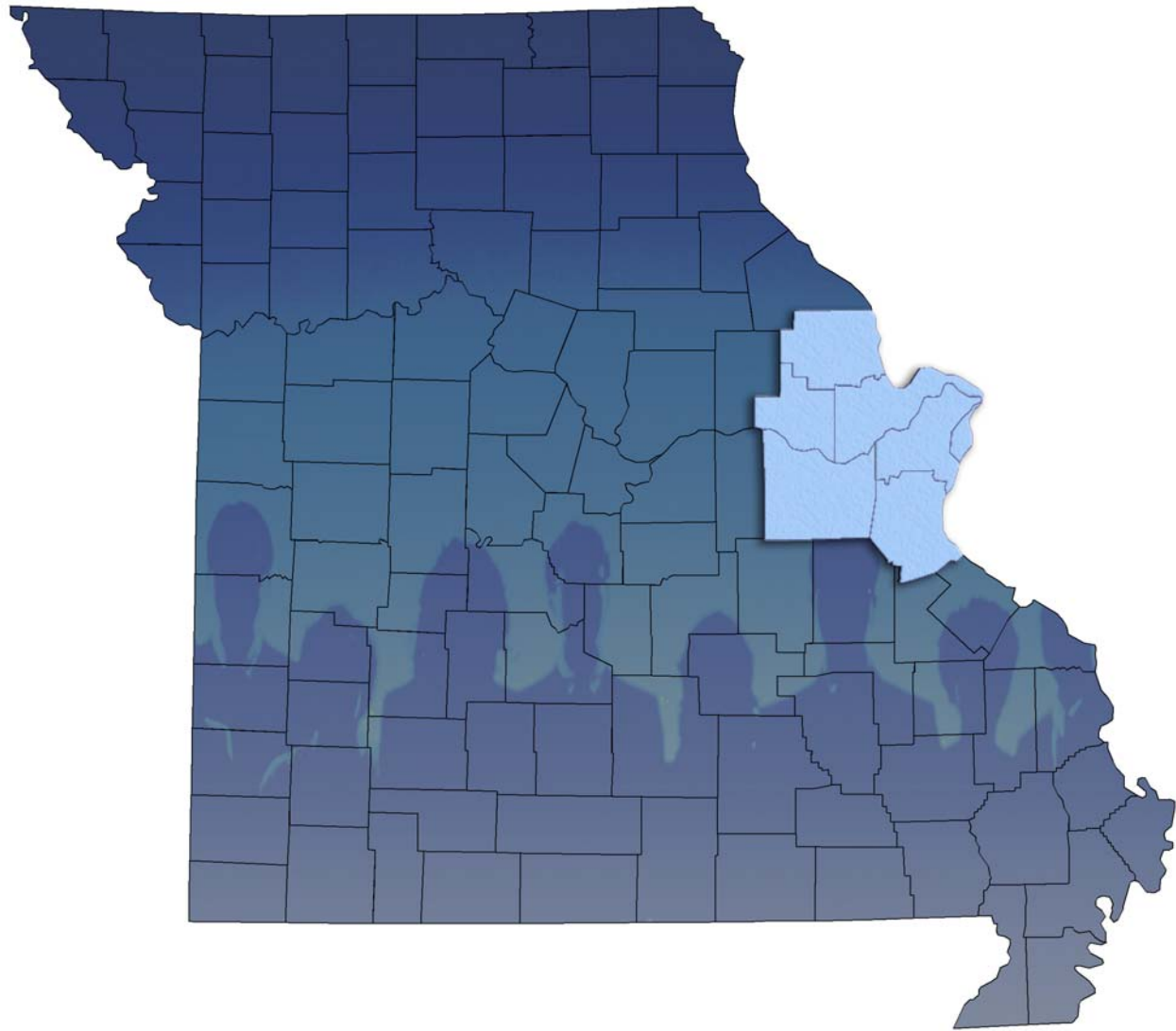


Missouri

Workforce Gap Analysis: Needs Assessment



Value Added Research With Customer Focus!

St. Louis MSA Region

301 W. High St. Room 580, Jefferson City, MO
65102
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MISSOURI DEPARTMENT OF ECONOMIC DEVELOPMENT
MERIC
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The St. Louis MSA Region



The St. Louis MO-IL Metropolitan Statistical Area (MSA) includes the city of St. Louis, Missouri and Jefferson, Franklin, Lincoln, St. Charles, St. Louis and Warren counties in Missouri. Clinton, Jersey, Madison, Monroe and St. Clair counties are on the Illinois state side.

The Missouri portion of the MSA accounts for 40% of the state's workforce. St. Louis has an excellent quality of life, offering exceptional cultural resources and multiple college and university campuses that offer an array of educational opportunities. Home to 15 Fortune 1000 companies Greater St. Louis ranks seventh in the United States as a headquarters location for Fortune 500 companies.

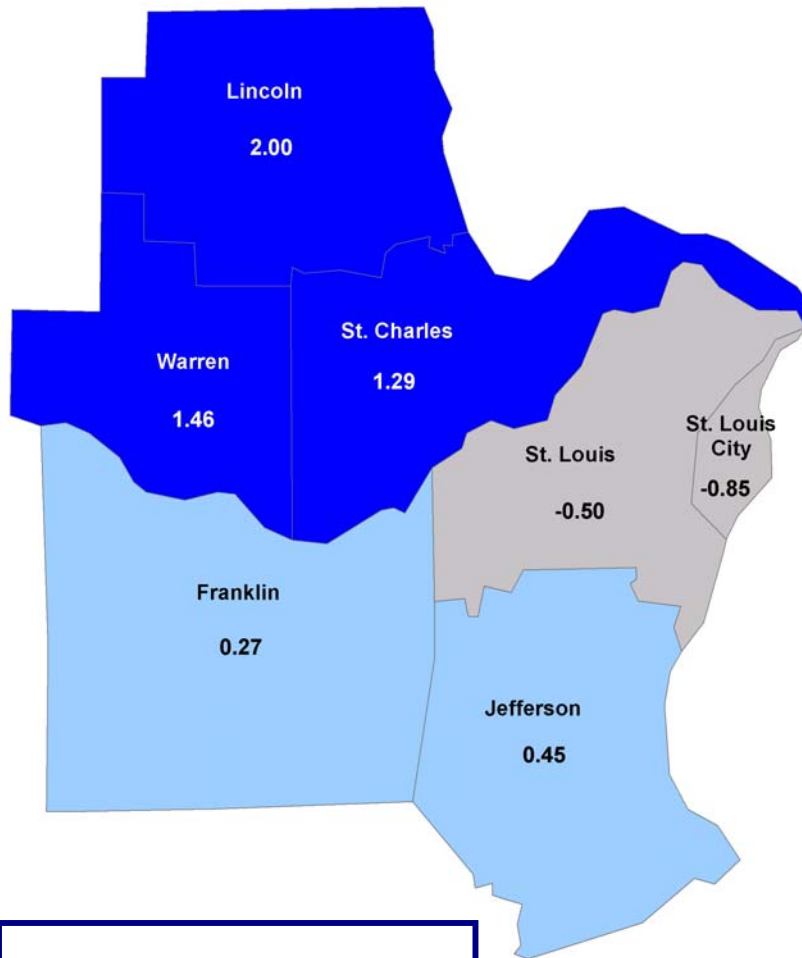
The Workforce Gap Analysis Needs Assessment for the St. Louis MSA shows that:

- Five of the seven counties in the St. Louis MSA have above average economic momentum.
- Five of the seven counties in the St. Louis MSA had higher unemployment rates than both the state (5.8%) and national rates (5.7%) in July of 2004.
- Poverty was much lower in the St. Louis MSA (9.56%) than the Missouri average (11.74%) in 2000. Poverty is somewhat concentrated in the metro areas of the region.
- The percentage of St. Louis MSA region workers earning a salary meeting the self-sufficiency standard is 59.83% for an adult with an infant, 41.19% for an adult with two children, 29.58% for two adults with two infants, and 16.36% for two adults with three children.
- The largest employing industries in the St. Louis MSA include: retail trade, state/local government, professional/technical services, and construction. The fastest growing industries in the region include: Internet services/data processing, ambulatory health care services, and social assistance. The highest paying industries in the St. Louis MSA include: mining, utilities, and management of companies/enterprises.
- Occupations with the largest number of annual openings include: retail sales workers, cashiers, and food preparation/serving workers. These occupations have many openings each year, but pay less than \$15,000/year. The exception is registered nurses, which pay above average wages of \$32,000/year and require at a minimum an Associates Degree.
- St. Louis workers laid off due to lack of work seem to increasingly gain 100% of their pre-layoff wage over a time period of six quarters. Workers laid off due to being fired or quitting however seem to earn at least 95% of their pre-layoff earnings after more than a year's time post-layoff.
- Top new businesses formed in the St. Louis MSA region were in the construction, professional/scientific services, and retail trade sectors.
- A significant number of workers in Lincoln, Jefferson, St. Charles, and Franklin counties have an average 34 to 48 minute commute to work, indicating that those residents are most likely driving outside their respective counties for work.
- The Educational Services sector has over 19% of its workforce over the age of 55. This means that in ten years this sector may potentially have problems finding enough qualified workers when their older workers retire. Meanwhile, many young workers find their first job opportunities in the accommodation and food services sector.

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What is Economic Momentum?

The Economic Momentum of an area is based on growth in employment, population, and income. An index score of “0” means that the county grew at the same rate as the state. The index thereby indicates areas of strong and weak economic momentum.



Counties with Notable Economic Momentum

- Within the St. Louis region, the counties of St. Louis and St. Louis City were the only areas with less than 0 on the Momentum Index.
- Lincoln County had the highest Momentum Index score of 2.00 when compared to the rest of the region.

Source: MERIC, U.S. Bureau of Labor Statistics, U.S. Census Bureau, & U.S. Bureau of Economic Analysis

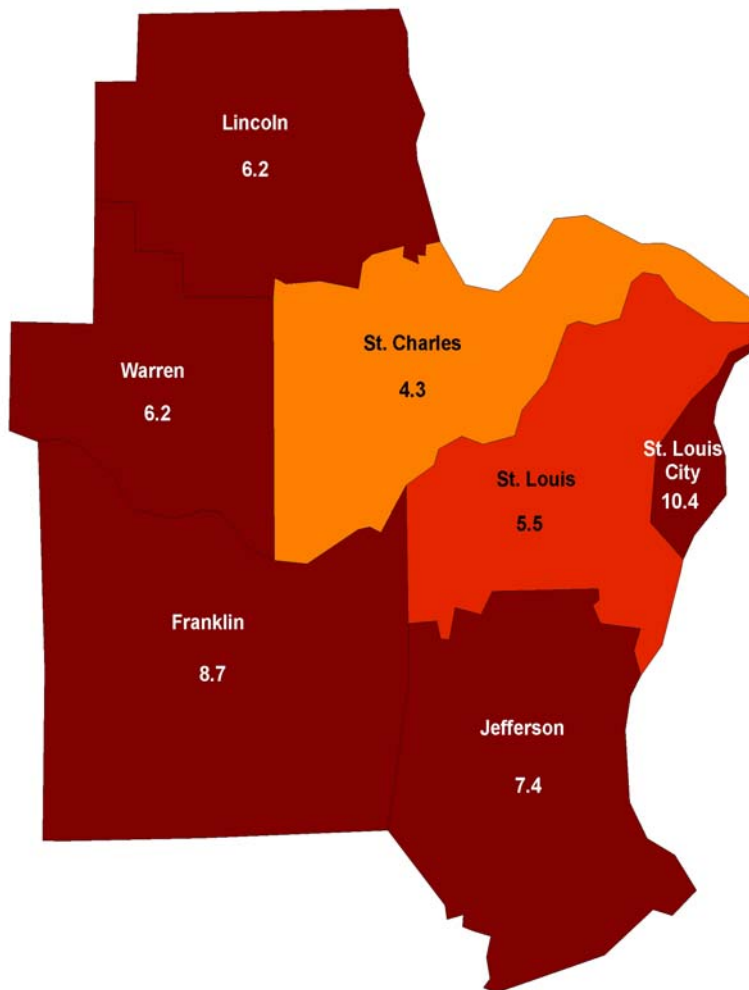
Workers Without Jobs

The unemployed population is defined as those who are over the age of 16 who were not working and were available for work. The unemployment rate is measured by calculating the number of unemployed persons as a percentage of the total labor force.

Percent of Population that is Unemployed

- The July 2004 unemployment rate for Missouri was 5.8%. The national unemployment rate was 5.7% for July 2004.
- In the St. Louis region, five counties have higher unemployment rates than both the state and national averages.
- Across the region, unemployment rates decreased in five counties from July 2003-2004. However unemployment did increase in two counties during that same time period.

Source: MERIC, with U.S. Bureau of Labor Statistics



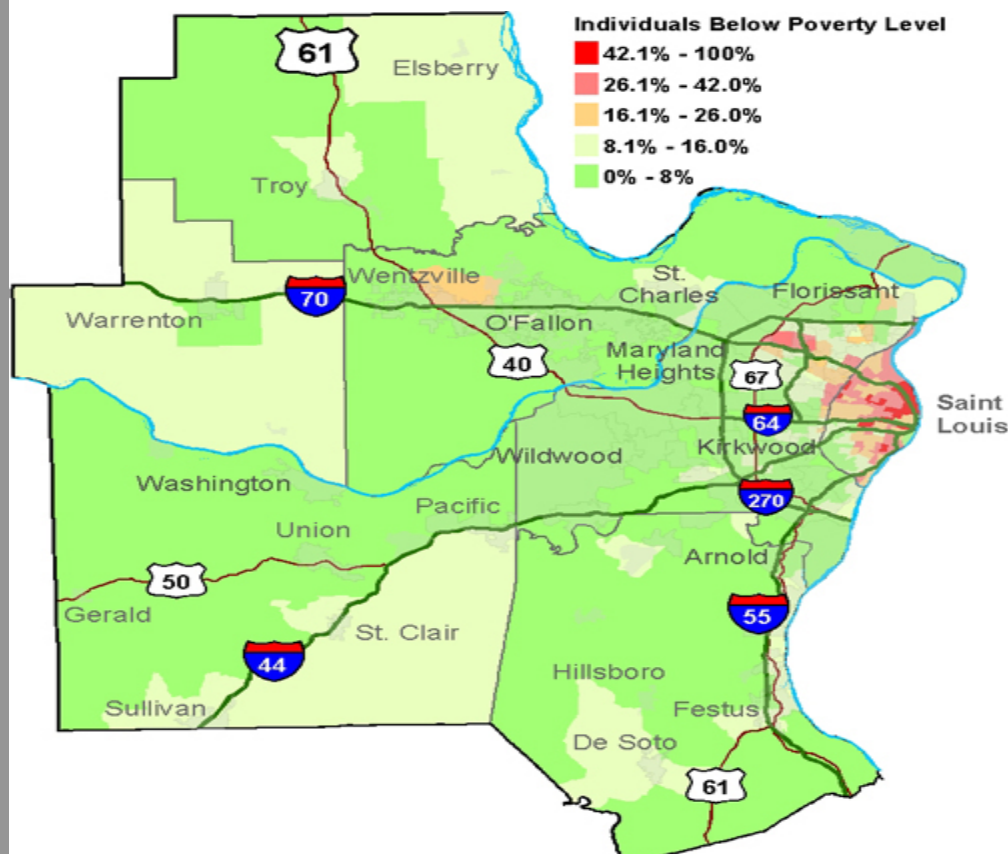
St. Louis MSA Region

Unemployment Rate



Area	Jul-04				Jul-03
	Labor Force	Employment	Unemployment	Rate	Rate
Franklin	53,178	48,541	4,637	8.70%	6.60%
Jefferson	114,999	106,459	8,540	7.40%	5.70%
Lincoln	22,149	20,776	1,373	6.20%	6.80%
St. Charles	181,714	173,869	7,845	4.30%	4.60%
St. Clair	4,080	3,834	246	6.00%	9.00%
St. Louis	597,468	564,863	32,605	5.50%	5.40%
Warren	13,921	13,055	866	6.20%	6.90%
St. Louis City	166,968	149,550	17,418	10.40%	11.10%

The poverty rate for a region is measured by the percentage of adults considered to be in poverty. The standards for poverty are set by the Federal government.



This mapping data is based on block-group level estimates from the census long form, which an average of 1 out of 6 households received. The maps should be used to reveal demographic patterns, not pinpoint exact block group values.

Percent of Population in Poverty

- The percentage of the total St. Louis MSA region population that was categorized as being in a state of poverty was 9.56% in 2000.
- The overall Missouri poverty rate for the same time period was 11.74%, somewhat higher than the rate for the St. Louis MSA region.

What do these numbers mean?

- Individuals in the St. Louis region may have higher wages and annual incomes than individual in other regions in Missouri.
- Poverty is mostly concentrated in the metro areas of the region.

Source: MERIC, using U.S. Census Data

Necessary Wages for Essential Needs

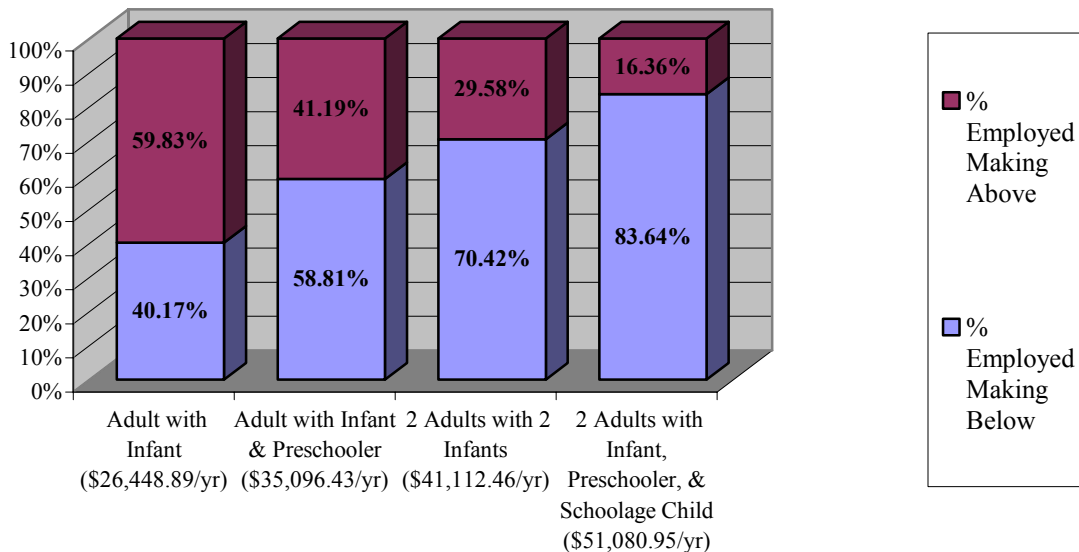
The Self-Sufficiency Standard for Missouri charts the actual costs of living and working in the region. It measures how much income a family needs to pay for housing, food, childcare, healthcare, transportation and taxes-if they do not receive any help from relatives, friends or the government-based on the ages, as well as number, of children in each household, and the family's geographic location.

Self-Sufficiency Standard for the St. Louis Metro Region						
County	Adult**	Adult with Infant**	Adult with Infant and Preschooler**	2 Adults**	2 Adults with 2 Infants**	2 Adults with Infant, Preschooler and Schoolage child**
County	Annual	Annual	Annual	Annual	Annual	Annual
Franklin County	\$15,768.36	\$25,457.88	\$32,521.08	\$23,977.80	\$39,475.68	\$48,096.48
Jefferson County	\$15,768.36	\$28,206.36	\$36,431.64	\$23,977.80	\$43,616.76	\$52,667.04
Lincoln County	\$15,031.44	\$22,566.60	\$28,371.36	\$22,635.84	\$35,306.76	\$44,236.20
St. Charles County	\$15,725.40	\$29,595.96	\$40,238.76	\$23,825.40	\$45,955.32	\$57,902.88
St. Louis County	\$15,781.92	\$29,784.84	\$40,356.24	\$24,000.48	\$46,141.80	\$57,977.40
Warren County	\$15,759.48	\$26,934.60	\$34,349.52	\$23,883.60	\$41,904.12	\$50,121.00
St. Louis City	\$12,537.84	\$22,596.00	\$33,406.44	\$17,939.88	\$35,386.80	\$46,565.64
WIA Average	\$15,196.11	\$26,448.89	\$35,096.43	\$22,891.54	\$41,112.46	\$51,080.95

Source: MERIC

**Original report by Diana Pearce, Ph.D. with Jennifer Brooks.

% of Workers Earning the Self-Sufficiency Wage in the St. Louis Region



Regional Industry Overview

Department of
Economic Development

Top Employing Industries

The largest employing industries in the St. Louis MSA include: *retail trade, state/local government, professional/technical services, and construction.*

In terms of national competitiveness, the management of companies sector is the most competitive while the state/local government sector is the least competitive.

ST. LOUIS MSA - TOP EMPLOYING INDUSTRIES

INDUSTRY - NAICS	JOBS 2002.00	PCT CHG 2002-2012	AVERAGE WAGE	US COMPETITIVENESS	
				LQ	CHANGE
Retail trade	126,216	1.35	\$19,066	0.89	(0.01)
State & Local Gov	98,825	1.54	\$39,193	0.70	(0.03)
Prof. tech services	85,975	5.54	\$40,334	1.09	(0.02)
Construction	78,671	(2.54)	\$35,676	1.06	(0.02)
Food services, drinking places	76,420	8.13	\$11,400	1.09	(0.00)
Administrative, support services	73,100	11.44	\$20,164	1.03	(0.03)
Wholesale trade	56,153	(6.14)	\$51,907	1.18	(0.02)
Mgmt of companies, enterprises	48,724	(3.61)	\$66,720	3.65	0.09
Hospitals	47,518	3.67	\$38,083	1.40	0.02
Educational services	45,348	18.27	\$30,539	1.85	0.06

US Competitiveness: (a) LQ of 1.00 is US average, (b) LQ Change of 0.00 is US average.

SOURCE: REMI 6.0, MERIC-MODED.

Top Employers St. Louis MSA by Employees (5,000 + workers)

Company	Description	NAICS
EDWARD JONES	SECURITIES BROKERAGE	52312003
ENTERPRISE RENT-A-CAR CO	PASSENGER CARS RENTAL	53211101
HUSSMANN CORP	AC, REFRIGERATION, & FORCED AIR HEATING	33341507
MARITZ INC	MISC SCHOOLS & INSTRUCTION	61169922
ST JOHN'S MERCY BEHAVIORAL	GENERAL MEDICAL & SURGICAL HOSPITALS	62211002
MAY DEPARTMENT STORES CO	DEPARTMENT STORES, EXCEPT DISCOUNT	45211101
A G EDWARDS & SONS INC	SECURITIES BROKERAGE	52312003
AMEREN UE	ELECTRIC POWER DISTRIBUTION	22112202
ANHEUSER-BUSCH INTL INC	BEER & ALE MERCHANT WHOLS	42481001
MITCH MURCH'S MAINTENANCE MGMT	JANITORIAL SVCS	56172001
NESTLE PURINA PETCARE CO	DOG & CAT FOOD MFG	31111101
ST LOUIS UNIVERSITY	COLLEGES & UNIVERSITIES	61131009
US BANK	LESSORS OF NONRESIDENTIAL BUILDINGS	53112004
US POST OFFICE	POSTAL SVC	49111001

Fast Growing Industries

The fastest growing industries in the St. Louis MSA include: *Internet services/data processing, ambulatory health care services, and social assistance.*

Most of the fast growing industries pay low wages and are not nationally competitive. However, the Internet service/data processing industry pays above average wages and is one of the area's most nationally competitive industries.

ST. LOUIS MSA - TOP GROWING INDUSTRIES

INDUSTRY - NAICS	JOBS 2002.00	PCT CHG 2002-2012	AVERAGE WAGE	US COMPETITIVENESS	
				LQ	CHANGE
Internet serv, data proc, other	4,540	32.55	\$64,639	0.98	0.06
Ambulatory health care services	42,004	21.56	\$41,257	0.94	0.00
Social assistance	26,046	21.49	\$9,651	1.16	(0.01)
Nursing, residential care facilities	20,883	20.86	\$21,604	0.93	(0.00)
Educational services	45,348	18.27	\$30,539	1.85	0.06
Amusement, gambling, recreation	13,217	17.17	\$20,570	1.08	0.03
Waste mgmnt, remed services	2,159	16.95	\$48,434	0.79	(0.04)
Motion picture, sound rec	1,840	15.14	\$22,136	0.55	(0.02)
Rental, leasing services	5,843	13.83	\$33,143	0.87	(0.01)
Federal Military	8,628	13.17	\$19,807	0.53	0.04

US Competitiveness: (a) LQ of 1.00 is US average, (b) LQ Change of 0.00 is US average.

SOURCE: REM I 6.0, M ERIC-MODED.

Top Paying Industries

The highest paying industries in the St. Louis MSA include: *mining, utilities, management of companies/enterprises, and federal civilian sectors.* In addition, the Internet services/data processing, transportation equipment manuf., publishing, motor vehicle manuf., chemical manuf., and broadcasting industries also pay higher wages of \$40,000 and above.

ST. LOUIS MSA - TOP PAYING INDUSTRIES

INDUSTRY - NAICS	JOBS 2002.00	PCT CHG 2002-2012	AVERAGE WAGE	US COMPETITIVENESS	
				LQ	CHANGE
Mining (except oil, gas)	1,420	(13.45)	\$83,045	0.75	0.13
Utilities	2,753	(11.87)	\$76,654	0.56	0.03
Mgmnt of companies, enterprises	48,724	(3.61)	\$66,720	3.65	0.09
Federal Civilian	23,987	2.97	\$65,088	1.14	0.08
Internet serv, data proc, other	4,540	32.55	\$64,639	0.98	0.06
Transp equip mfg. exc. motor veh	10,134	(15.16)	\$64,565	1.91	0.10
Publishing, exc Internet	6,537	(11.00)	\$62,776	0.78	(0.05)
Motor vehicle mfg	15,762	(17.32)	\$62,435	1.77	(0.00)
Chemical mfg	10,873	(16.47)	\$60,671	1.48	0.02
Broadcasting, exc Int; Telecomm	17,490	(7.78)	\$57,294	1.29	(0.02)

US Competitiveness: (a) LQ of 1.00 is US average, (b) LQ Change of 0.00 is US average.

SOURCE: REM I 6.0, M ERIC-MODED.

Top Openings by Occupation

Occupations with the largest number of annual openings (new jobs + replacements) include:

- Retail sales workers, cashiers, food preparation and serving workers, and waiters and waitresses.

Although these occupations have over 600 openings each year, they pay very low wages, less than \$15,000 per year, and require minimal education and experience.

The exception is registered nurses, which have nearly 980 annual openings yet pay above average wages of \$32,000 per year and require at a minimum an Associates Degree.

ST. LOUIS MSA - TOP OPENINGS BY OCCUPATION

OCCUPATION - SOC	PERCENT CHANGE	ANNUAL OPENINGS	ENTRY WAGE	AVERAGE WAGE	REQUIRED EDUCATION AND EXPERIENCE
Combined Food Preparation and Serving Workers	27.82	2,069	\$12,175	\$15,334	Short-term on-the-job training
Retail Salespersons	9.27	1,866	\$12,477	\$20,349	Short-term on-the-job training
Cashiers	10.35	1,777	\$12,277	\$15,406	Short-term on-the-job training
Waiters and Waitresses	18.19	1,562	\$12,189	\$15,649	Short-term on-the-job training
Registered Nurses	17.16	987	\$32,875	\$43,140	Associate degree
Office Clerks, General	8.07	955	\$15,957	\$22,707	Short-term on-the-job training
Laborers and Freight, Stock, and Material Movers, Hand	0.58	726	\$14,329	\$23,640	Short-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cle	11.64	718	\$14,010	\$19,550	Short-term on-the-job training
General and Operations Managers	7.22	604	\$35,320	\$77,780	Work experience plus bachelor's
Stock Clerks and Order Fillers	2.60	602	\$14,880	\$22,590	Short-term on-the-job training

SOURCE: Long-Term Projections, MERIC-MODED and ETA-USDOL

How Job Openings Affect the Region

- Based on this information, the highest demand jobs over the next ten years will require minimal skills or on-the-job training, thus not placing major strains on the local educational system.
- However, the need for about 980 RNs each year over the next decade will require local educational institutions to expand or develop nursing programs to fill this need; or the St. Louis MSA will have to recruit nurses from outside the region.

Fastest Growing Occupations

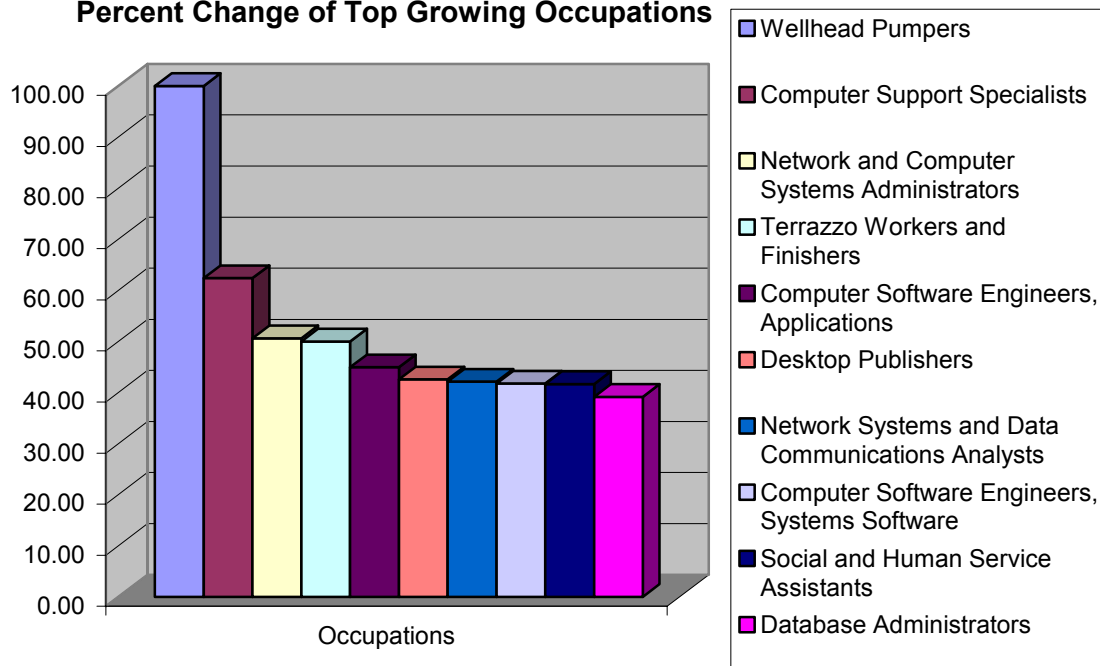
The fastest growing occupations in the St. Louis MSA are: wellhead pumpers, computer support specialists, and network/computer systems administrators. Although the employment base and number of openings are small, these occupations generally pay higher wages.

ST. LOUIS MSA - TOP GROWING OCCUPATIONS

OCCUPATION - SOC	PERCENT CHANGE	ANNUAL OPENINGS	ENTRY WAGE	AVERAGE WAGE	REQUIRED EDUCATION AND EXPERIENCE
Wellhead Pumpers	100.00	ND	ND	ND	Moderate-term on-the-job training
Computer Support Specialists	62.38	407	\$26,140	\$42,230	Associate degree
Network and Computer Systems Administrators	50.63	123	\$39,700	\$55,010	Bachelor's degree
Terrazzo Workers and Finishers	50.00	ND	ND	ND	Long-term on-the-job training
Computer Software Engineers, Applications	44.96	195	\$47,640	\$68,060	Bachelor's degree
Desktop Publishers	42.57	27	\$21,630	\$33,070	Postsecondary vocational training
Network Systems and Data Communications Analysts	42.14	90	\$40,150	\$60,280	Bachelor's degree
Computer Software Engineers, Systems Software	41.75	105	\$48,310	\$67,490	Bachelor's degree
Social and Human Service Assistants	41.65	157	\$16,270	\$21,840	Moderate-term on-the-job training
Database Administrators	39.15	40	\$40,330	\$59,890	Bachelor's degree

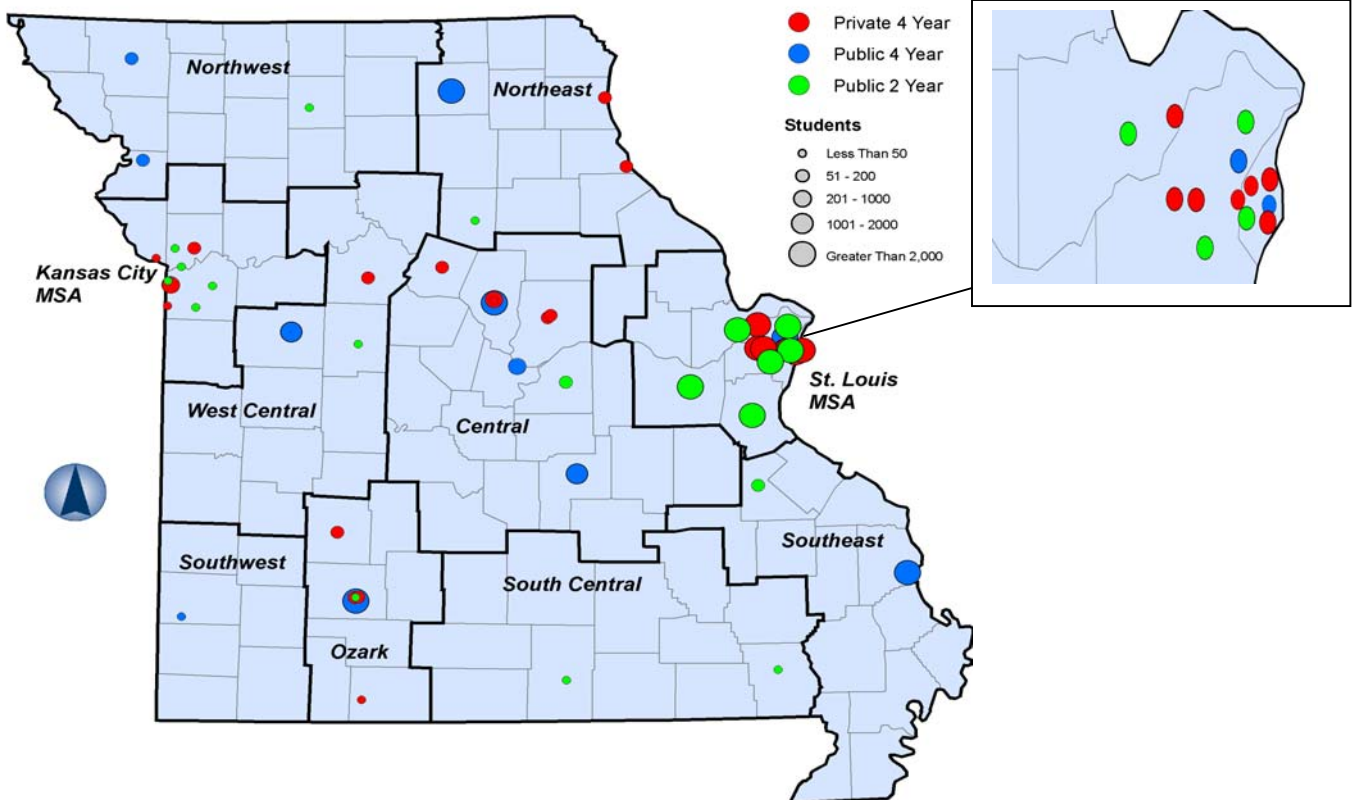
SOURCE: Long-Term Projections, MERIC-MODED and ETA-USDOL

Percent Change of Top Growing Occupations



The number of students from the St. Louis region that go on to attend college describes whether or not local high school graduates go inside or outside the region to meet their post-secondary educational needs.

Where High School Students from the Region go to College



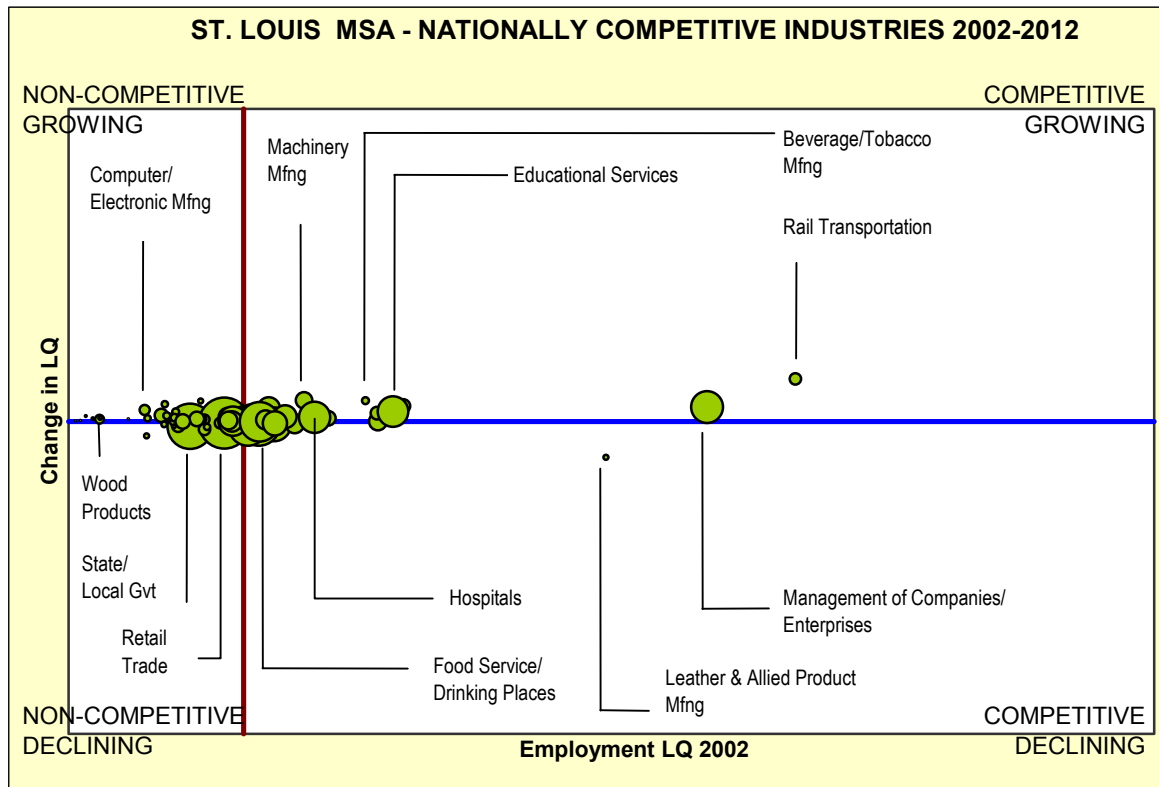
Post-Secondary Institutions with 20 or More Undergraduates from the St. Louis Region (1999-2003)

20-50 students	50-100 students	100-250 students	250-600 students	1000-2000 students	2000-6000 students	6000-12000 students
Stephens College	Culver-Stockton	Rockhurst	Columbia	Harris-Stowe	SLU	Meramec
Missouri Southern	Mineral Area	Drury	Lincoln	Wash U	Lindenwood	UMSL
OTC	MVC	MO Western State	UMKC	Fontbonne	Jefferson	Florissant Valley
State Fair	William Jewell	Westminster		UMR	SMSU	UM-Columbia
Coll. of the Ozarks	William Woods	Central Meth. Univ.		Central MSU	East Central	Forest Park
Moberly Area	Linn State	Northwest MSU			Webster	St. Charles CC
	Hannibal-Lagrange	Southwest Baptist			Maryville	
	Evangel				SEMO	
					Truman State	
					Missouri Baptist	

Source: MERIC, Statistical Summary of Higher Education

Industries Competing On a National Level

The St. Louis MSA has 27 nationally competitive industries, of which 16 are growing and 11 are declining. Competitiveness means that the St. Louis MSA has a competitive advantage in these industries relative to the rest of the United States, indicating that the MSA is highly specialized in these sectors in terms of value-added.



The top competitive and growing industries include:

- ***Rail transportation, management of companies/enterprises, beverage/tobacco manufacturing, educational services, and machinery manufacturing.***

It is expected that these industries will continue to be the competitive drivers of the St. Louis MSA economy.

The top competitive but declining industries include:

- **Leather/allied product manufacturing and motor vehicle manufacturing**

These industries are in danger of losing their competitive advantage, to the detriment of the St. Louis region.

Regional Target Industries

Department of
Economic Development

How are Life Science Industries defined?

Life Science Industries are those industries that use life-saving and life-enhancing technologies to improve the quality of life for people. These companies employed 5.57% (145,698) of the state's total workforce in 2003. The concentration of Life Science Industries in the St. Louis region during the same time period was 46.53% of the state's total Life Science Employment.

Employment in Life Sciences (2003)			
County	# of Employees	# of Establishments	Annual Wage Per Job
Franklin	1928	39	\$28,952.27
Jefferson	1497	40	\$27,753.75
Lincoln	34	5	\$21,127.95
St Charles	4396	73	\$34,120.03
St Louis	35894	454	\$48,999.08
Warren	N/D	N/D	N/D
St Louis City	24024	127	\$40,929.58
St. Louis MSA	67788	739	\$44,116.66

* N/D: Unable to disclose data due to Bureau of Labor Statistics confidentiality restrictions.

Source: MERIC, Bureau of Labor Statistics

What are Advanced Manufacturing Industries?

High-Technology Industries that fall within the manufacturing sector are considered Advanced Manufacturing. During 2003, Advanced Manufacturing industries employed 4.13% (108,089) of the state's total workforce. The concentration of Advanced Manufacturing Industries in the St. Louis region during the same time period was 50.75% of the state's total Advanced Manufacturing Employment.

Employment in Advanced Manufacturing (2003)			
County	# of Employees	# of Establishments	Annual Wage Per Job
Franklin	2873	49	\$37,766.98
Jefferson	847	34	\$39,412.25
Lincoln	N/D	N/D	N/D
St Charles	5844	73	\$63,718.56
St Louis	37275	383	\$65,149.03
Warren	409	6	\$36,900.01
St Louis City	7599	127	\$52,877.93
St. Louis MSA	54860	674	\$61,244.55

* N/D: Unable to disclose data due to Bureau of Labor Statistics confidentiality restrictions.

Source: MERIC, Bureau of Labor Statistics

Regional Critical & In-Danger Occupations

Competitive and Growing Occupations

The occupations in a region that are competitive on a national scale and are in industries that show strong growth in terms of new job openings are important in terms of the fact that such industries are and will continue to be the competitive drivers of the St. Louis MSA economy. The staffing patterns within each of these critical industries can show which occupations are critical in terms of continuing the region's high specialization in these sectors.

St. Louis Critical Occupations (Competitive-Growing)			
SIC	Industry	SOC	Occupations
40	Rail transportation	*considered un-covered employment by UI laws of Missouri	
372,373,379	Transp equip mfg. exc. motor veh	51-4121	Welders, Cutters, Solderers, & Brazers
82	Educational services	25-2021	Elementary School Teachers, Except Special Education
45	Air transportation	53-7062	Laborers and Freight, Stock, & Material Movers, Hand
806	Hospitals	29-1111	Registered Nurses
35	Machinery mfg	51-2092	Team Assemblers
921	Federal Civilian	*considered un-covered employment by UI laws of Missouri	
72	Personal, laundry services	51-6011	Laundry & Dry-Cleaning Workers
79	Amusement, gambling, recreation	39-6021	Tour Guides & Escorts
44	Water transportation	43-4181	Reservation & Transportation Ticket Agents & Travel Clerks

Source: MERIC, U.S. Bureau of Labor Statistics

Non-Competitive and Declining Occupations

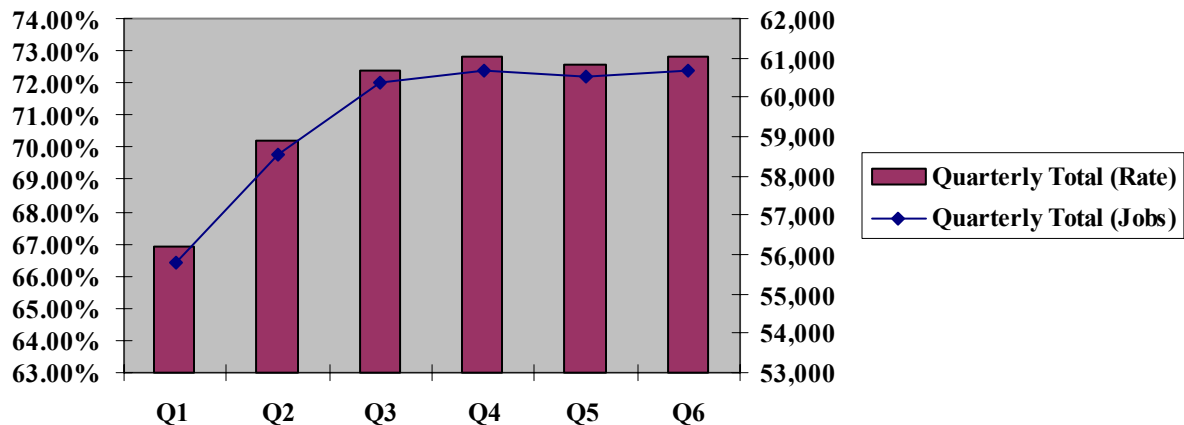
Likewise the occupations in a regions that are not competitive on a national scale or within industries that show declining growth in terms of new job openings are important for both currently employed workers in those occupations and for job seekers deciding which career paths to move toward.

St. Louis In-Danger Occupations (Non-Competitive Declining)			
SIC	Industry	SOC	Occupations
805	Nursing, residential care facilities	31-1012	Nursing Aides, Orderlies, & Attendants
52-59	Retail trade	41-2031	Retail Salespersons
39	Miscellaneous mfg	51-9071	Jewelers and Precious Stone & Metal Workers
42,49	Waste mgmnt, remed services	53-3032	Truck Drivers, Heavy & Tractor-Trailer
20	Food mfg	53-7064	Packers & Packagers, Hand
91	State & Local Gov	*considered un-covered employment by UI laws of Missouri	
32	Nonmetallic mineral prod mfg	51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers
227,229,239	Textile prod mills	51-6031	Sewing Machine Operators
78	Motion picture, sound rec	41-2021	Counter & Rental Clerks
23	Apparel mfg	51-6031	Sewing Machine Operators

Percentage of Laid-off Workers That Find Jobs

The number of workers that find jobs after being laid off is measured up to six quarters after the initial layoff occurs.

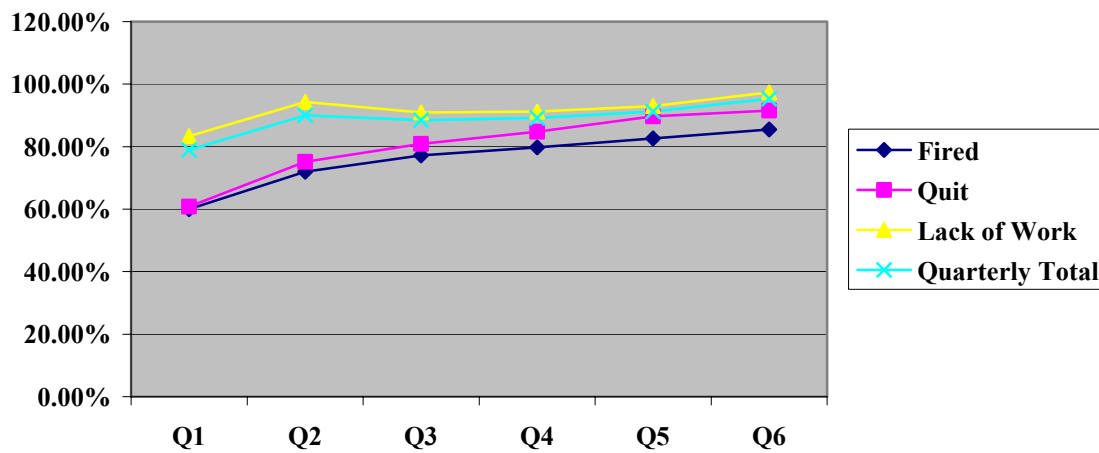
St. Louis Region: Re-employment of Laid-off Workers (2002)



Worker Salaries Before and After Layoffs Occur

St. Louis workers laid off due to lack of work seem to increasingly gain 100% of their pre-layoff wage over a time period of six quarters. Workers laid off due to being fired or quitting however seem to earn at least 95% of their pre-layoff earnings after more than a year's time post-layoff.

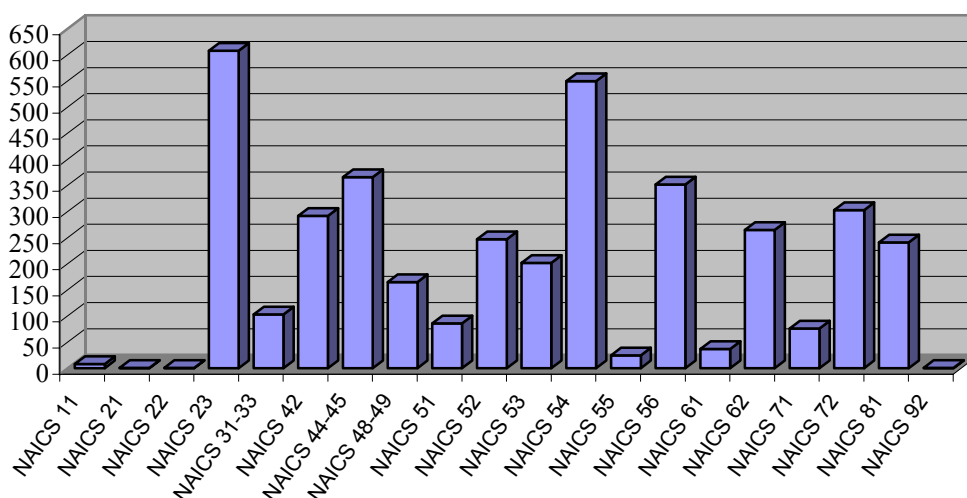
Post-Layoff Wage as a Percentage of Pre-Layoff Wage (2002)



The Impact of New Businesses Formations for a Region

The number of new businesses that formed in the St. Louis region in 2003 was headed by businesses in the construction, professional/scientific services, and retail trade sectors. Construction businesses saw the largest increase with over 608 new businesses forming in the region in 2003.

New Business Formations in St. Louis MSA by Industry



NAICS 11	Agr., Forest., Fishing & Hunting Support Activ
NAICS 21	Mining, Except Oil and Gas
NAICS 22	Utilities
NAICS 23	Construction
NAICS 31-33	Manufacturing
NAICS 42	Wholesale Trade
NAICS 44-45	Retail Trade
NAICS 48-49	Transportation & Warehousing
NAICS 51	Information
NAICS 52	Finance & Insurance
NAICS 53	Real Estate, Rental, & Leasing
NAICS 54	Professional, Scientific, & Technical Services
NAICS 55	Management of Companies & Enterprises
NAICS 56	Administrative, Support, & Waste Services
NAICS 61	Educational Services
NAICS 62	Health Care & Social Assistance
NAICS 71	Arts, Entertainment, & Recreation
NAICS 72	Accommodation & Food Services
NAICS 81	Other Services
NAICS 92	Public Administration

Source: MERIC, U.S. Bureau of Labor Statistics

Businesses With Slower Formation Growth

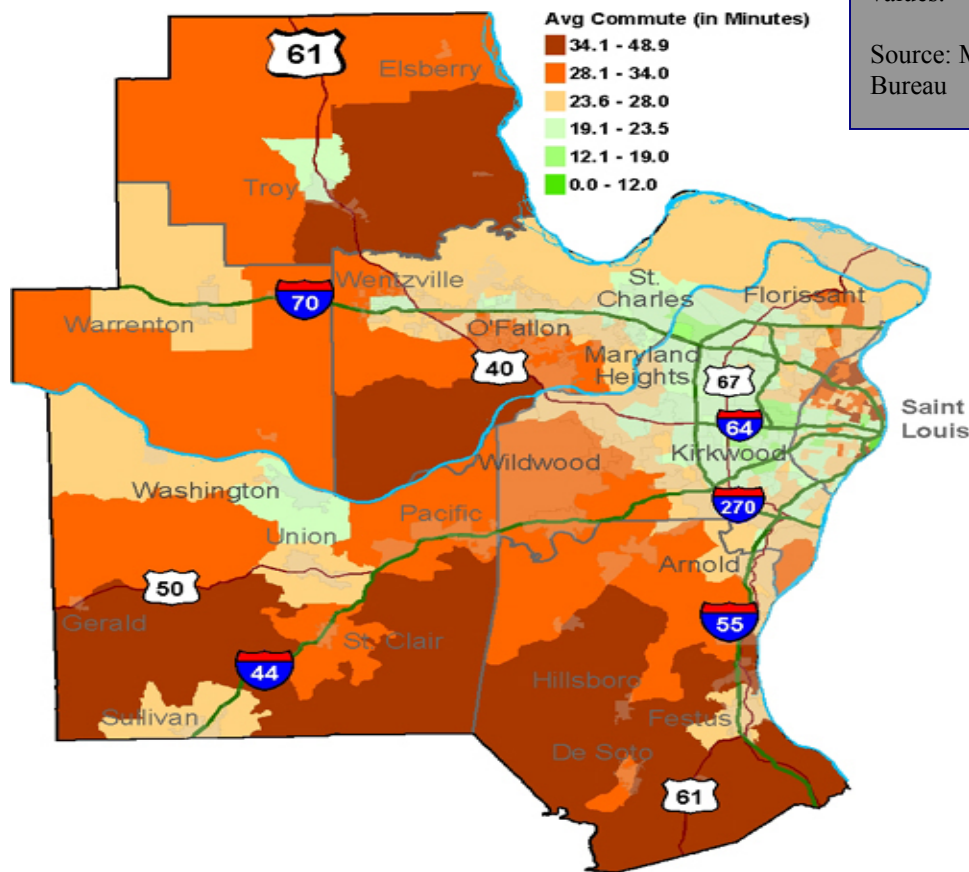
New business formation in the agricultural activities, mining, utilities, and public administration sectors was considerably low in the St. Louis MSA region in 2003.

Driving to Work in the Region

The time that it takes a worker to commute to their occupation reflects the availability of jobs located within a region.

This mapping data is based on block-group level estimates from the census long form, which an average of 1 out of 6 households received. The maps should be used to reveal demographic patterns, not pinpoint exact block group values.

Source: MERIC, U.S. Census Bureau



The Time That it Takes Workers To Commute Within the Region

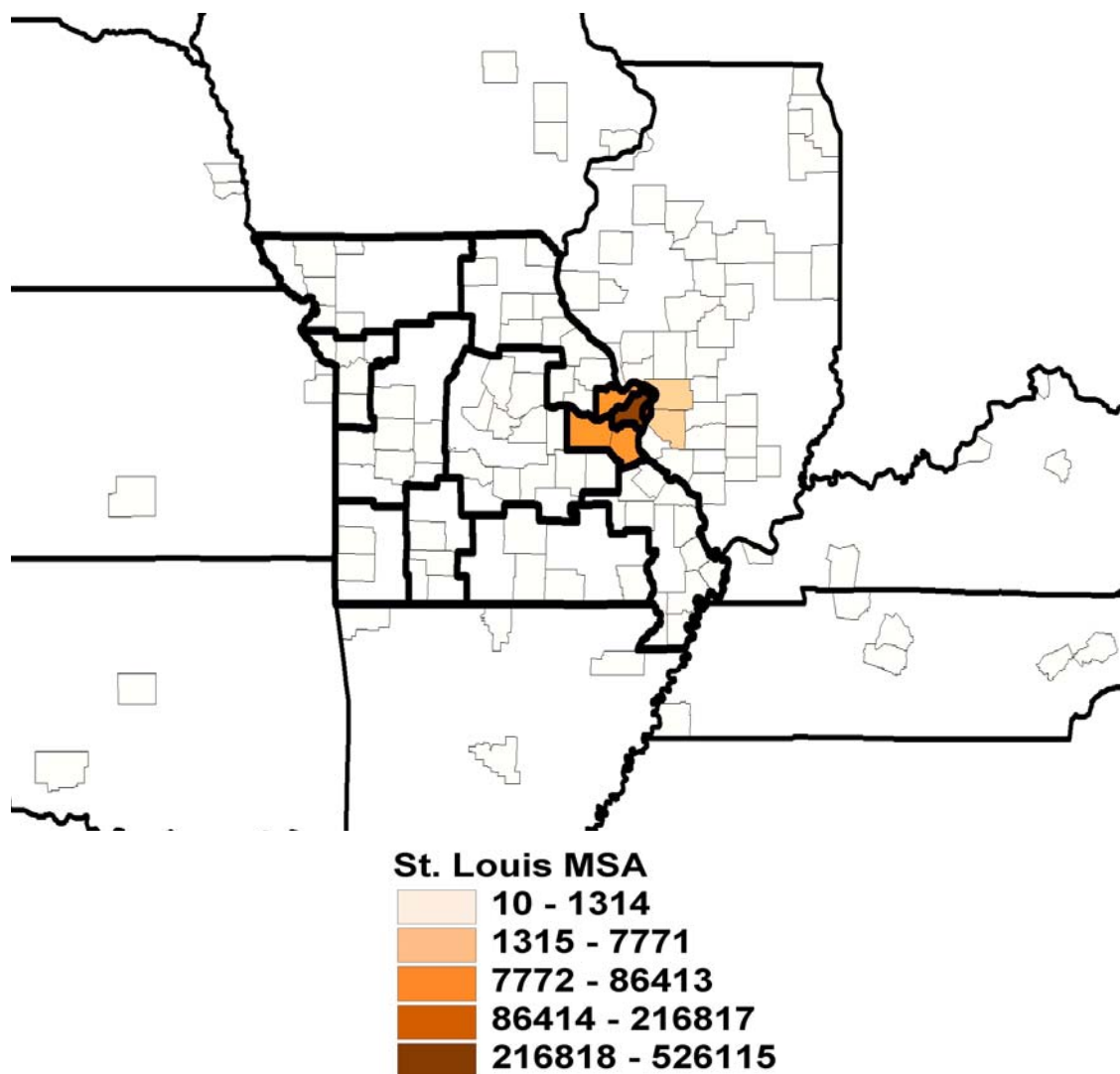
- A significant number of workers in Lincoln, Jefferson, St. Charles, and Franklin counties have an average 34 to 48 minute commute to work.
- Based on the commuting patterns of workers in those counties, workers are most likely driving outside their respective counties for work.

Source: MERIC, using U.S. Census Data

Workers Commuting In and Out of the Region

- There is not a significant number of residents in the St. Louis MSA that commute outside of the region to work.
- The map indicates that most St. Louis residents have employment in or near the county where they live.

Source: MERIC, using U.S. Census Data

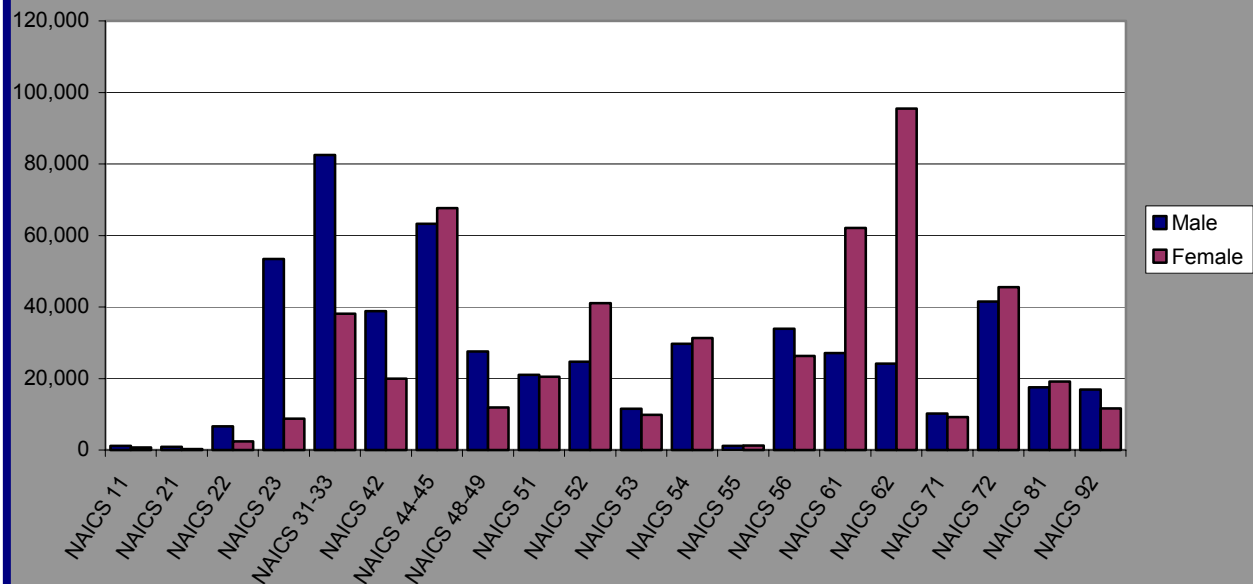


Composition of the Workforce

The St. Louis region's workforce can be broken down in terms of age and gender composition by industry. The St. Louis region's construction, manufacturing, and transportation sectors are predominantly staffed by male workers. The healthcare, educational services, and finance/insurance sectors have mostly female workers.

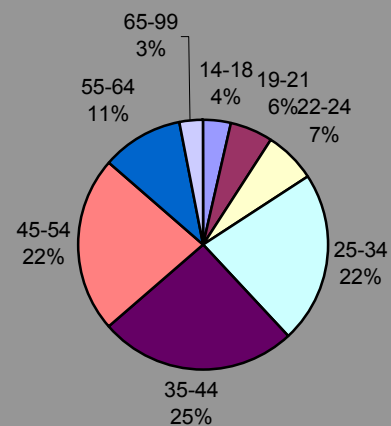
St. Louis MSA Region

Makeup of the St. Louis MSA Workforce by Major Industry and Gender



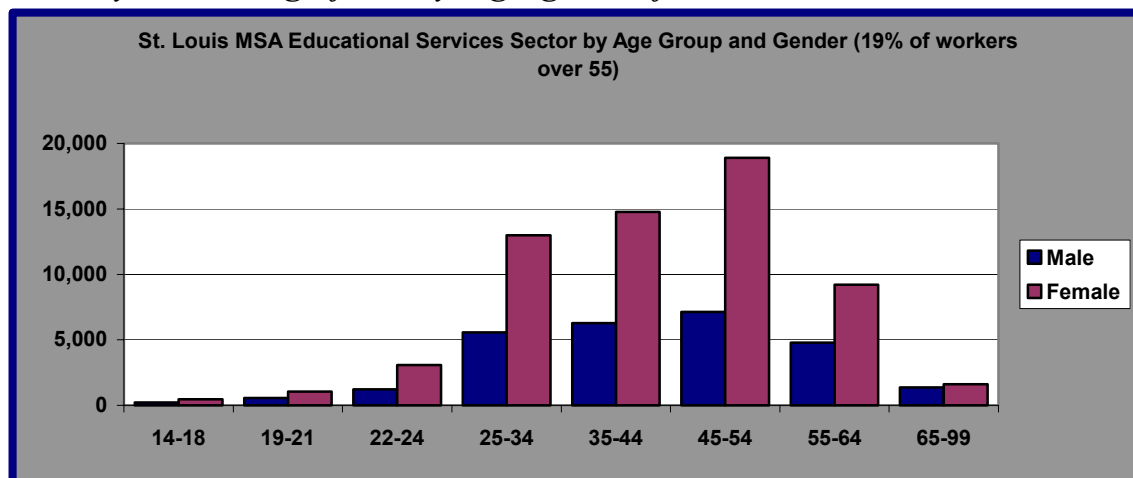
NAICS 11 Agriculture, Forestry, Fishing and Hunting
 NAICS 21 Mining
 NAICS 22 Utilities
 NAICS 23 Construction
 NAICS 31-33 Manufacturing
 NAICS 42 Wholesale Trade
 NAICS 44-45 Retail Trade
 NAICS 48-49 Transportation and Warehousing
 NAICS 51 Information
 NAICS 52 Finance and Insurance
 NAICS 53 Real Estate and Rental and Leasing
 NAICS 54 Professional, Scientific, and Technical Services
 NAICS 55 Management of Companies and Enterprises
 NAICS 56 Administrative and Support and Waste
 NAICS 61 Educational Services
 NAICS 62 Health Care and Social Assistance
 NAICS 71 Arts, Entertainment, and Recreation
 NAICS 72 Accommodation and Food Services
 NAICS 81 Other Services (except Public Administration)
 NAICS 92 Public Administration

Workers by Age Group

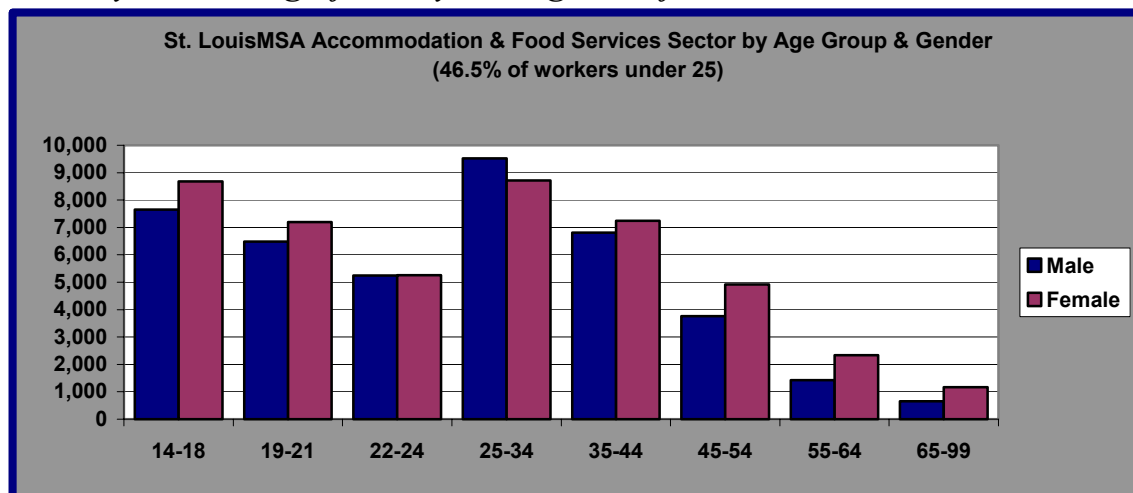


Age composition by industry can determine whether or not local colleges and technical schools are providing enough training for young workers who will be filling in the gaps left by those retiring.

Industry with a Significantly Aging Workforce



Industry with a Significantly Young Workforce



Source: LED, U.S. Census Bureau

What do These Results Mean?

The Educational Services sector has over 19% of its workforce over the age of 55. This means that in ten years this sector may potentially have problems finding enough qualified workers when their older workers retire. Meanwhile, many young workers find their first job opportunities in the accommodation and food services sector.

Acknowledgements

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Additional economic information resources can be accessed on the Internet at
www.missourieconomy.org.



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